



DONORS' ADVANTAGE

A semi-annual newsletter produced by the
Community Foundation of Ottawa for its donors

Community
Foundation of
Ottawa



Fondation
communautaire
d'Ottawa

For good...forever Le bien...toujours

Spring 2010

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Welcome from the President & CEO

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"The Community Foundation of Ottawa is both a catalyst and a resource for philanthropy in the region. I am delighted by the organization's phenomenal growth. It is a tribute to the generous citizens of Ottawa who want to give something back to the community, both during and after their own lifetime."

John Crow, donor and former
Governor of the Bank of Canada

It is my great pleasure to share with you the premier issue of Donors' Advantage, a newsletter created just for you, our donors. This is in response to your request for more frequent communications about news and events that affect the Foundation. The result is this semi-annual newsletter which is being sent to donors either in print or electronically.

In this first issue of Donors' Advantage, I am thrilled to share the story of a donor who is particularly close to our hearts here at the Community Foundation.

Ann Diamond has been part of the Foundation family for 12 years as a donor, volunteer and ambassador. I am sure you'll enjoy the story of this kind and selfless member of our community, and that you'll be as inspired by her life's work as we are.

While Ann's fund currently provides annual grants to a wide variety of local charities each year, it is also set up as a bequest to continue her legacy beyond her lifetime. We'll share some tips and information for those of

you who might be interested in looking into building this option into your current fund. A deferred gift (through a bequest in your will, a gift of life insurance or RRSP), could have significant tax benefits for your estate.



Barbara McInnes

We're also pleased to share a few highlights of the grants disbursed in 2009 so that you can see for yourself just a few examples of the good work being done in our community thanks to the generosity of all of our donors.

I feel truly blessed to work with the many donors and volunteers involved with the Community Foundation, but I am equally proud of the staff, each of whom works so diligently to support all that we do. As donors, you can take comfort in knowing that you have an exceptional team here working on

your behalf.

It's a privilege to introduce you to these special people through a dedicated staff profile in each of these newsletters. In this issue, you'll learn more about our Vice-President, Bibi Patel, who heads up our Development and Donor Services team, as well as directing the Foundation's marketing efforts.

Finally, we wish to thank all of you for your patience and generosity as we weathered the economic storm of the last couple of years. It has been truly rewarding to work with so many of you to find innovative ways to support the community through these difficult times. We are truly gratified by your positive response to the new policies and practices the Foundation has put in place to improve our ability to respond to any future fluctuations in the market.

I hope you enjoy this first issue of Donors' Advantage. Please feel free to contact me personally at any time with questions or suggestions at bmcinnes@cfo-fco.ca / 613-236-1616 ext. 227.

GRANTS IN ACTION

FOLLOWING IS A SAMPLING
OF SOME OF THE GRANTS
MADE IN 2009

Pinecrest-Queensway Community Health Centre's Bayshore Community Building Initiative is a *No Communities Left Behind* community-based strategy to engage residents, identify priorities and develop and implement action plans. Resulting activities will build community leaders and connect them with resources to find workable solutions. Funding of \$20,000 was provided to support this initiative.

The **Lowertown Community Resource Centre** operates an early childhood program each weekday morning for francophone children between the ages of 0–6 who are living in poverty. Funding of \$25,000 was provided to address an immediate funding shortfall in the delivery of this program.

Ecology Ottawa delivers the Green Buildings and Workplaces Challenge program, which is designed to support green teams to reduce their environmental impact in the workplace and beyond. Funding of \$10,000 was provided to support this program.

The Leading Note champions access to musical activities for local children as an integral part of their education for lifelong benefits, regardless of family income and experience. Funding of \$4,000 was provided to help maintain 2009 programming.



Ann Diamond is a singularly determined and independent woman. An only child who grew up in Saskatoon, Saskatchewan, Ann moved to Ottawa in 1975 following a diversified administrative dietetics career in Toronto, Calgary and Vancouver.

Ann then worked for 16 years as Director of Dietetics at the Ottawa Civic Hospital where she was part of a team who founded the largest centralized hospital food production operation in the country.

When she retired in 1991, Ann was able to turn her attention to her many other interests, including music, gardening and travel. To our great fortune, one of her favourite passions soon became charitable giving and the work of the Community Foundation of Ottawa.

Introduced to the Foundation by her lawyer when preparing her will, Ann became immediately smitten with the work being done through the Foundation.

Not only did she find it an ideal vehicle through which

she could give to the many causes and organizations she cared about, but she felt a strong personal connection to the Community Foundation itself after attending one of its annual Celebrations.

"I was so impressed by the people and the program they organized to celebrate this community that I immediately asked about becoming a volunteer," said Ann Diamond, "and it turned out my timing was perfect as the Foundation had just lost its office volunteer. Soon enough I was filing and photocopying and doing anything required to help the office run smoothly."

Thus began the illustrious second "career" of one of the Community Foundation's most tireless and dedicated ambassadors.

"Ann's long-standing assistance in our office has been a God-send." says Barbara McInnes, President & CEO of the Foundation. "She very willingly pitches in wherever we need her help and we count ourselves very fortunate to have her as part of our extended team. She has a very gracious relationship with all of our staff and is a constant reminder of the generosity of our donors and volunteers."

For her part, Ann is most appreciative of the flexibility and community insight the Foundation offers her as a donor.

"Since establishing my fund here I have learned so much more about the community than I could have discovered on my own. I particularly appreciate the personal service I receive, and the fact that I'm able to make gifts to all my favourite charities by writing one single cheque each year. It helped me to go from making ad hoc charitable donations to a much more strategic approach to my giving."

Among her many interests, Ann is particularly passionate about supporting children and the elderly, and in contributing to those who work to fight poverty and homelessness in Ottawa. She does this by using her fund to support organizations like the Ottawa Mission, the Boys and Girls Club, Big Brothers, Big Sisters, as well as a variety of support programs for seniors, local community houses, and school breakfast programs. An avid music aficionado, Ann also supports music education programs, including those for underprivileged students.

Having established a donor-advised fund that will continue via a bequest after her lifetime, Ann is especially pleased with the fact that she can make these ongoing charitable gifts now, and that her fund will continue to support organizations and causes she cares so deeply about in perpetuity.

Featured Donor—Ann Diamond

A Legacy of Giving—Bequest by Will

Including a **Charitable Bequest** in your will is a simple way to make a lasting gift to your community. When you make this gift through the Community Foundation, we establish a special fund that benefits your chosen purposes forever and becomes your personal legacy of giving.

How it works

- You include the Community Foundation in your will as a bequest; we can help you or your lawyer with recommended language.
- We can work with you to determine the type of fund you would like to establish with your gift, or you may choose to add a bequest to your current fund.
- Upon your death, we set up a special fund in your name, in the name of your family, or in honour of any person or organization you choose.
- Your charitable gift is eligible for a tax receipt for estate tax purposes.
- The Foundation issues grants in the name of your fund (if you prefer, grants can be made anonymously).
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. The fund then makes grants addressing community needs. Your gift is a permanent source of charitable capital, helping to do good work forever. We are also open to limited-term endowments.

More Benefits

Making a bequest to the Community Foundation of Ottawa is an easy way to transfer assets to charity. And, you can decide to do it at any age by adding to an existing will or drafting a new one. In doing so, you leave a legacy to your community, while enjoying the assets you need to maintain your current lifestyle.

You can give cash, appreciated stocks, or other assets. Some of the most tax-efficient asset types to give through your will come from appreciated stocks. You may also choose to make a gift of a life insurance policy or RRSP/RRIF directly for further tax benefits.

For samples of will text, or for more information on ways to give, please contact Bibi Patel at the Community Foundation of Ottawa at bpatel@cfo-fco.ca / 613-236-1616 ext. 226.



RECENT BEQUESTS

THE FOLLOWING BEQUESTS WERE ESTABLISHED BETWEEN 2005 – 2009

Arieska Fund
Sara Camblin Breault and Guy
Breault Fund
Sandra H.K. Budd Fund
Rick and Bev Chataway
Foundation
Judith M. Dowler Fund
Jeff and Leah Eustace Family Fund
Hugo and Gretl Keren Fischer
Foundation Fund
Mayo Graham Fund
Elinor Green and Joel Hunter
Fund
Marilyn Hart Fund
Doug Harvey-Smith Fund
Honour Fund
Rex J. Hussey Fund
Tom Lawson and Sheila Casey
Fund
Maple Leaf Fund
Catherine Estelle Mason Fund
Robert and Ann Matyas Fund
James Michael McCormack Fund
Mitanni's Rainbow Bridge Fund
Teresa O'Donovan Fund
Jo Ann Parton Fund
Judy Patterson Fund
Bob and Catherine Richer Fund
Elsbeth and Chris Ross Fund
Richard Roulx Fund
Andrew Frank Serbin Foundation
Stead Family Advised Fund
Inez Sunderland Fund for Literacy
in Ottawa
Jean Tickner Fund
Percy, Teresa and Jill Vaughan
Family Fund
Bruce White and Karen McDonald
Fund

FOR GOOD...FOREVER

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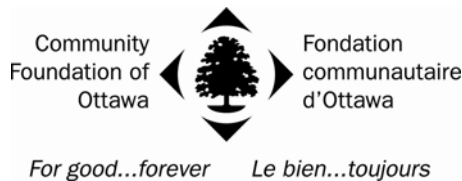
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Mailing Address Line 4

Mailing Address Line 5



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Staff Member Profile

Bibi Patel has been with the Community Foundation for eight years and currently leads the teams working in Development, Donor Services, Marketing and Communications.

Having spent the first stage of her career in the private sector, Bibi is delighted to now be working for a different "bottom line", one where she gets to live her passion for making a difference in the lives of others.

Whether it's through having an initial conversation with someone embarking on their philanthropic journey, helping a donor with his or her grantmaking, or promoting the Foundation to the broader community, Bibi is convinced she has the best job in the world.



Bibi Patel, Vice-President

The Foundation has been fortunate to have someone with Bibi's strong background in leadership, management and strategic planning. She has been instrumental in moving the organization forward in these areas, and derives a great deal of satisfaction from the strides the Foundation has made in terms of its general planning framework, and its human resources management, specifically.

If asked what part of her job she is most passionate about, Bibi would readily disclose that it's the opportunity to work with the Foundation's donors. Their generosity, compassion and commitment to the community serve as a constant source of inspiration. They care deeply, think critically, feel passionately, challenge freely and make wise decisions.

Connecting donors with the many selfless and dedicated experts working tirelessly on the frontlines in our community is the ultimate reward. Bibi feels strongly that few organizations could have offered her the opportunity to make a difference in this way.

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